



WHITE PAPER

Build Omni-Channel with the Blocks You Already Have

The Build vs. Buy Decision



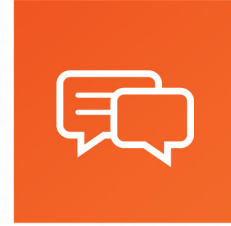
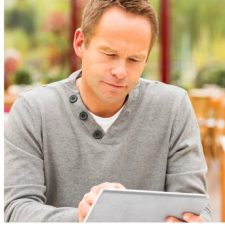
*This document is
Copyright © 2017 by USAN.*

*This document contains information that is confidential
and proprietary to USAN. No part of this publication
may be reproduced or distributed in any form or by
any means or stored in a database or retrieval system
without prior written permission of USAN.*

*All products, trade names, and registered trademarks
used in this document are acknowledged.*

Table of Contents

- 4 Overview
- 6 Omni-channel Customer Engagement: Here to Stay
- 10 How to Reduce Risk
- 12 The Benefit of Metaphor Engage



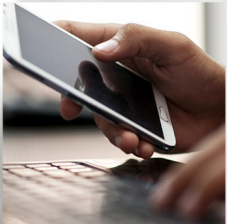
Phone. Email. SMS messaging. Social media. Web chat. Organizations today engage with customers via more channels than ever before. Companies expand their marketing reach, meeting customers where they are, and at crucial moments in the buying process. Unfortunately, each channel warrants another tool by which the organization manages those communications. The result is a collection of silos, with customers existing as a separate entity in each channel. The IVR system doesn't know that a customer recently abandoned an online shopping cart, and the social media platform doesn't know that she recently made a payment via the IVR system. None of the systems know that the same customer unsubscribed from the weekly promotional email.

Omnichannel customer engagement promises to break down these multichannel silos. Omnichannel customer engagement enables organizations to take customer service to the next level by integrating channels and allowing one to inform another. In an Omnichannel infrastructure, the IVR system knows that the customer abandoned an online shopping cart so the customer service agent inquires about it. The social media platform knows that a payment was made via the IVR, so a message is sent thanking the customer for her payment. Later, an online coupon is sent to the customer as an incentive for rejoining the mailing list.

The benefits of integrating communication channels are obvious. But getting from multichannel to omnichannel is not. The technology to enable omnichannel customer engagement is relatively new. Only a small handful of companies have achieved the level of customer service indicative of omnichannel customer engagement, and even fewer have shared their success stories.

Managers looking for clues on where and how to start are unlikely to find any resources of value. There are few case studies and none of them go into enough detail to provide the information necessary to guide an organization through the process.

It is our goal to change that with this white paper. There are two common approaches to achieving omnichannel customer engagement: building a custom solution and buying a commercial off-the-shelf solution. We delve into the pros and cons of each, and present a third alternative. We also explain how to get from here to there while minimizing the risk associated with a large, potentially complex project. By the end of this paper we hope you will have the information you need to make a solid start on the way to omnichannel customer engagement.



Omnichannel Customer Engagement: Here to Stay

As the newest contact center technology, omnichannel customer engagement is surrounded by hype – and for good reason. Customer service is playing an increasingly important role, particularly in competitive service-based industries like insurance, finance and utilities. Lower prices only go so far to keep customers. They are quick to switch companies while vocalizing their grievances on social media and the like if they don't receive the service they expect.

Going forward, a company's ability to deliver superior customer service will be key to business success, especially in industries where customer service is a competitive differentiator.

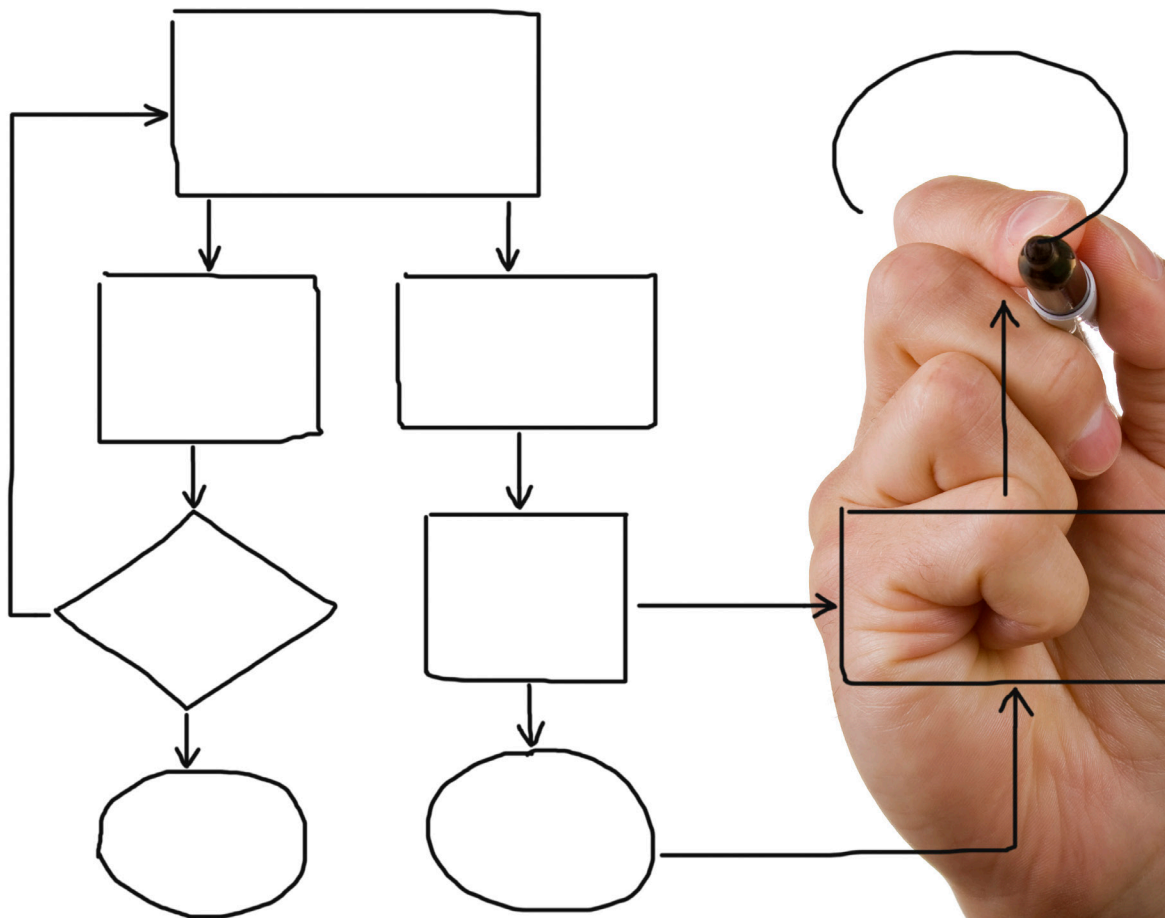
An omnichannel customer engagement platform can empower companies to take their service levels to new heights simply by better leveraging the customer data they already have. But not just any platform will do. The solution must meet several requirements, and they are non-negotiable. To start, the platform must be flexible to accommodate changing business goals. Business goals can change frequently based on any number of factors: the time of year, the availability of new products and services, competitor activity, the financial market, etc. The omnichannel customer engagement platform should not only support these goals, but actually help you to meet them by allowing business users to make appropriate modifications.

The solution must also be extensible to accommodate additional technologies and communication channels. Email, web and social media became mainstream technologies in a relatively short timespan. No doubt new technologies will present additional communication channels by which companies can engage with their customers.



An omnichannel solution must be future proof in that it can accommodate whatever comes down the pipeline.

And, of course, an omnichannel platform must meet technical requirements for security and stability. Because the platform stores and transmits sensitive data, like payment cardholder data and personally identifiable information, the solution must be built with the proper security controls. Compliance with the Payment Card Industry's Data Security Standard (PCI-DSS) helps provide assurance that data is properly protected. Stability is also crucial given the scope of the deployment. Look for nothing less than five nines uptime.



The omnichannel challenge

It is easy to get excited about omnichannel customer engagement and the potential for improving the customer journey. Unfortunately, it is just as easy to become overwhelmed by it. Managers only have to hold their first team meeting to realize the scope of an omnichannel project and the risk it brings.

By its very nature, omnichannel customer engagement crosses many technologies: the IVR, CRM, social media platform, email database, web analytics, etc., and therefore, it crosses many departments and impacts many budgets. Coordinating stakeholders and decision makers across these groups can be an incredible feat. Departments must be willing to change how they work. Finally, there is the issue of current investments. Nobody wants to scrap systems that have not yet reached end of life.

In general, making changes to existing technologies or procuring new systems that affect customers is relatively easy. You demonstrate the benefit, the budget is approved, the project is prioritized by IT and it gets done – perhaps not as soon as you’d like, but there is an end in sight. With a project as big as omnichannel, the end isn’t clear. There are too many stakeholders involved, too much money is involved, and too many decisions must be made. A designated budget may help address some of these issues, but the enormity of an omnichannel project puts it at a disadvantage. The IT organization has a list of other projects that are smaller, easier and more profitable, and therefore get prioritized over omnichannel.

So, where do you start? There are two common ways to tackle this beast of a project: build a custom solution or buy a commercial off-the-shelf solution.

1

The Pros & Cons of Building a Custom Solution

Companies with an internal development team or the budget to outsource development to a third party have the option of building a custom omnichannel solution. However, this approach involves far more challenges than advantages.

Internal development teams are usually well suited for building small, one-off projects, but they are not in the business of software development. Companies typically don't have the internal expertise to build a solution that spans multiple departments and technologies, nor do they have the resources to complete it in a reasonable length of time. Then there is the issue of support and future changes. Who would maintain and manage the solution? Internal development is great for very specific, smaller scale efforts – like integrating your legacy host to your CRM or changing the screen on your CRM to provide different information – projects that are one-and-done. But omnichannel is not that project. Omnichannel is too big and too complex of a project for an internal development team.

Companies that have the budget but lack internal development resources may consider hiring a third party to build an omnichannel solution. This option should be approached with caution. Omnichannel is an incredibly complex project to hand off to a third party that neither understands your business nor the concept of omnichannel customer engagement. You must be able to communicate requirements in such a manner that the project accomplishes the desires of each part of the organization, while trusting the third party well enough to give access to systems to build integrations. This option then presents some of the same challenges as building a solution internally: How long will the project take? Who will support it? Can you rely on the development firm to be available to make changes for the life of the solution? And, finally, how much will it cost?

Either way you look at it, if you're building a custom solution internally or outsourcing development to a third party, building a custom omnichannel solution is a high-risk proposition.

2

The Pros & Cons of Buying a COTS Solution

Buying a commercial off-the-shelf (COTS) solution is often considered an alternative to building any custom solution. Carefully choosing an omnichannel vendor with broad expertise that has designed its products to work together certainly presents less risk. Some professional services may be necessary for implementation, but development time is eliminated. IT may be able to make some changes to the solution, and vendors typically provide technical support.

The drawbacks of a COTS solution relate to cost and technical conflicts. Most organizations purchase best-of-breed systems whenever possible. These systems invariably come from multiple vendors. In addition, each system has a different set of internal owners – people who made the purchasing decision, deployed the systems to best suit their operation, and trained staff to efficiently run them.

The heart of omnichannel customer engagement is integration, but integration is difficult to achieve, so vendors typically build their omnichannel solutions to integrate solely with their own systems.

Not only is this approach expensive, it leaves departments with replacements that are more likely “rest of breed.” The result is conflict. Take away a chat or email tool from the owner and give them something less, and you have a scuffle on your hands.

And, you already know this, but those vendors with all of the tools – they didn’t build them all to work together, or even build them all. The tools were designed to be silos, and they are often acquisitions to broaden the vendor’s technology portfolio. As a result, the vendor faces the same challenges getting the various tools to speak to each other that you have, and after all of this, integration may be less than optimal.

In order to fully leverage a COTS omnichannel solution, you must rip out and replace a number of other systems that have not reached end of life, sacrificing both operational (training and in-house expertise) and capital investments.



How to Reduce Risk

At the end of the day, both approaches – build versus buy – present an unacceptable level of business risk. They require putting a lot of money on the line with no foreseeable end point and/or return on investment. Before you do anything then, your first step to achieving omnichannel customer engagement should be to reduce the risk associated with the project itself.

Begin with the solution. Resolve to keep your existing technology investments in place, regardless of how many different vendors they come from. These specific tools were chosen for sound business reasons. Respect these decisions and build off of them. A desire to achieve omnichannel customer engagement, no matter how beneficial, does not justify throwing out existing tools.

Work with a trusted provider with a history in omnichannel customer engagement that has built a solution to be flexible and extensible. The omnichannel market is relatively nascent, but the concept and the technology have been around for quite some time. Find a provider that has its roots in customer engagement and understands the need for a solution that is flexible, allowing you to make modifications in line with business goals, and extensible, so that future communication channels do not become their own silos outside of the omnichannel solution.

Keep business owners happy. Don't take away key functionality, and don't require complicated changes to business processes. Any changes should simplify business processes and provide a clear benefit to the organization, be it in improved productivity, improved customer engagement, etc. This will increase adoption and enable you to show a return on investment sooner than you would otherwise.

You can further reduce business risk by taking a staggered approach to your omnichannel project, rather than attempting to roll it out across the entire company. Start with the lowest hanging fruit; the most broken piece within the customer journey. This may be the fact that the IVR doesn't know that the customer abandoned an online shopping cart or recently unsubscribed from the mailing list. Choose a small area to address that has the potential for high value. Use this as your proof of concept and when you have success move on to the next piece. This approach simplifies the decision-making process and keeps budgeting manageable, while enabling you to show ROI.

Finally, in your efforts to reduce risk associated with your omnichannel project, forget the build versus buy decision, because neither option allows you to take the steps above to lower risk.



The Third Option: USAN's Metaphor Engage

There is a third option for achieving omnichannel customer engagement, which enables you to reasonably reduce business risk associated with investments and project timelines while achieving the business benefits omnichannel promises. This third option offers the convenience of a COTS solution along with critical integrations and customizations that enable you to leverage existing investments and processes. This option is the USAN Metaphor Engage platform.

Metaphor Engage is designed for interconnectivity. It engages your existing channels, back office systems, data storage, customer management, billing systems, etc., in a unified manner to allow a consistent message for each customer. It engages your customer communication channels that you already have – IVR, ACD, Web, chat, email, social, etc. – so that you know how your customers are connecting with you, what they are doing, and when they move to another channel. It engages your customers by knowing their preferences, what they want, which channels they use, what they did on each channel – not just today, but last month or last year – which enables Metaphor Engage to manage the customer experience journey across multiple channels, over multiple visits. It engages your business executives by reducing the cost of improving customer satisfaction – which increases sales, loyalty and lifetime value.

Metaphor Engage is specifically designed to meet companies where they are today. That means you can leverage your current investments in best-of-breed tools. There's no need to rip and replace any of your existing systems to achieve integration. We have a simple integration process – a secret sauce, if you will – that sits in the middle of all your systems and enables one to speak to another. As a result, technology owners keep the systems they purchased, trained their people on and run their business with, and you get omnichannel without the conflict.

This approach also allows you to start your omnichannel project with a single step on the customer journey, making the decision process simple and the budgeting manageable. USAN even has a proven delivery methodology to reduce your risks and to make sure the customer journey you want to create is within sight. We follow the Omnichannel 3D Method – Discover, Design and Deploy with Continuous Improvement.

Finally, USAN has a history in this space. We were delivering omnichannel solutions before it was called omnichannel, so we understand the challenges you face as you approach your project. Our solution doesn't just connect disparate tools that we acquired over the past 20 years. On the contrary, USAN's Metaphor Engage was built over a period of 10+ years to pull silos together and build something stronger, more powerful. With Metaphor Engage, the whole is greater than the sum of its parts.

Benefits of Metaphor Engage

Metaphor Engage offers other benefits beyond reducing the risk of your omnichannel project. Because the platform is flexible, business owners can make modifications inline with changing business goals. This reduces internal IT engagement, freeing staff to work on more strategic projects, while enabling organizations to react quickly to changes in their business and in the market, competitors, world events and so forth.

Metaphor Engage is also extensible, so you can rest assured that it will accommodate whatever new technology or communication channel comes along. They won't just be bolted on, but rather cohesively integrated with your other communication channels in a strategic manner.

Metaphor Engage also helps teams improve productivity and ensure consistent processes are applied across all communication channels by enabling re-use. A single process that is used within every channel, like customer authentication, can be set up in a centralized management console and then applied within each channel according to policy. So, in the case, of authentication, the level of security is consistent from one channel to another, but the mechanism for achieving that security is appropriate for that channel.



Use Cases

There are many ways companies can leverage USAN Metaphor Engage for omnichannel customer engagement. Here are just a couple examples:

Sean and his wife are shopping for life insurance following the recent birth of their first child. He stumbles upon the website for ABC Insurance and experiments with the company's online tools designed to help prospects determine how much life insurance they need and how much money they can save by going through ABC. While doing so Sean submits his name, phone number and other pertinent information, including the recent birth of his son, to ABC Insurance. But there are many insurance options, and Sean still isn't sure which life insurance plan is appropriate for him.

Sean calls ABC Insurance and, after authenticating himself to the IVR, is greeted with an automated message congratulating him on the birth of his son and welcoming Sean to the ABC Insurance family. He is then routed to a customer service agent representative, who accesses all of the information Sean already submitted online and quickly determines the best options for him. The agent representative walks Sean through the plans and closes the sale all over the phone. In this scenario, USAN Metaphor Engage pulls the data that customers submit via the ABC website into the CRM. The IVR accesses this information and present offers, menus and options based on this data.

Here's another scenario:

Rachel works long hours and can't make it to the bank during regular operating hours to deposit her payroll checks. So every two weeks she makes a deposit via the ATM. The following day Rachel calls customer service during operating hours to confirm her balance. With USAN Metaphor Engage, Rachel's financial institution is able to recognize this behavior. The next time Rachel calls to confirm her balance, an IVR prompt asks her permission for the bank to send an SMS message to notify her when future deposits are credited to her account. She sees this as a convenience and an example of the great service she receives from her local branch, creating a very positive customer experience.



Conclusion

Like any large, complex enterprise technology project, there's a lot of risk involved with omnichannel customer engagement projects. But not implementing an omnichannel solution is just as risky as taking the wrong approach. Omnichannel enables companies to differentiate themselves from their competitors and build customer loyalty. Companies must address the risks associated with omnichannel so they can realize its benefits – and sooner, rather than later. USAN's Metaphor Engage enables companies to do just that. To learn more about USAN Metaphor Engage and how we can help make your omnichannel project a success, call us at (770) 409-2441.



3080 Northwoods Circle
Norcross, GA 30071

www.usan.com

office 770.729.1449

fax 770.729.8589

About USAN

USAN helps companies profitably engage customers and deliver amazing omnichannel experiences with the industry's best cloud and hybrid customer engagement solution. From traditional telephone interactions to web-based communications including chat, email and social, USAN's portfolio of contact center applications gives users infinite flexibility in the way they engage customers across channels. In addition to hosted ACD, IVR, WFM, Quality Management and Agent Desktop, USAN offers back-office integration and business process automation powered by a sophisticated omnichannel rules and workflow engine. All built upon a fifth-generation, carrier-grade infrastructure that delivers the highest availability in the industry with proven scalability to support the largest enterprises.